Chapter 7 System and Data Governance

Governance suggests that employee actions are being monitored. Jobs that are repetitive can be easily monitored for quality control and throughput (ie a buyer completed 30 purchase orders per day in their ERP system). Perhaps accounting/operations people are accustomed to having their performance closely monitored but creatives such as Marketing and Sales probably would not appreciate an increased form of supervision. Also Marketing and Sales are different activities that are unpredictable, you can work a week with little progress, and then BAM! All the work comes to fruition quickly the deal is made, the idea or promotions is produced after much deliberation. So performance is not predictable and needs a longer time frame.

CRM systems are large and complex and are front-office, customer facing tools. So now creatives need to get used to being monitored. This will feel like the back office departments (with their boring ERP systems) are winning control of the front office types. Naturally this feels constricting. Too bad, if only marketing departments of universities taught CRM software in one of their classes to complement the conceptual and self-aggrandizing content. Sigh.

IT governance including CRM governance is concerned with ensuring IT systems are used with good user experience and satisfaction, used correctly, uniformly, and deeply. Governance teams get reports of system usage depth and breadth. Hopefully governance teams help improve processes and performance to make system usage efficient. They work with managers to make plans for training, implementation, usage and integration and prioritizing the improvements (CRM systems are always in beta test). A good governance team of executives should not push their pet projects and aims, rather work to implement the changes that lower level managers request)

So a team of managers & specialists are needed to do the CRM planning and guiding before, during, and after implementation. A CRM governance team (aka steering committee) provide guidelines of IT system usage, organize, and document changes (hopefully) according to the and accountability for the strategy, execution and management of IT.

IT and specifically CRM governance includes data stewardship and data quality and data governance.

1. Does the data entry process for transactions rely more on typing in values (less data quality) or selecting options from pre-defined lists (more data quality)? Especially for key fields ‘pick-lists’ are much safer to use.
2. Does your reporting process require a lot of manual merging of data, organizing it, cleaning the data, etc. to make the reports accurate?
3. Does your company have too many information systems? How do you know which system to use for what process? Is there a guidebook, or do you need to constantly ask questions of what to use in what situation?
4. Is there any formalized feedback loop mechanism in your company for system use improvement such as sharing of best practices?
5. How important is the guiding of future development and customization of software such as a CRM be talked about, prioritized, budgeted, planned, carried out, tested and
6. If you make reports, is it troublesome to merge data from different data sources? For example one data source can use the column name ‘location’ and the next table use the column name ‘region’. Also the values in the columns can be different such as HCMC, Ho Chi Minh City, and Saigon. In addition to the column names is there any agreement in your data entry fields?
7. Should top management run steering committees? (may increase meddling and muddling). Or should lower level managers and project leads that work with the software on a daily basis?

Assignment – Do a little research on IT governance or CRM governance and submit a list of what activities they should be involved in.